**Department of
Community Services**

**A.B. Smith
Director**

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September 14, 2004

Jane H. Woods, Secretary Health and Human Resources
Chair, State Executive Council
Commonwealth of Virginia
Post Office Box 1475
Richmond, Virginia 23218

Dear Secretary Woods:

At the April 28, 2004 meeting of the State Executive Council (SEC) concerns were raised during the Public Comment period regarding the Data Set, submissions and software. The SEC asked that the CSA Data Collection Task Force meet and discuss those concerns. An excerpt from the minutes of that meeting is attached.

The Data Collection Project was a massive undertaking that was implemented for FY2004 following two years of careful study. In addition to the SEC request, the Task Force therefore considered it appropriate and essential to analyze the first 12 months of Data Collection operations. To do this, the Task Force held three meetings, reviewed input from localities, the Office of Comprehensive Services (OCS) and the Department of Social Services (DSS). A focus group was conducted with CSA software vendors.

The Task Force has concluded that the problems occurring during the first year have largely been related to the need for greater clarity of the data elements. OCS and DSS have responded as these needs have been identified, working toward a common understanding of the elements by offering clarifications, training and pursuing adequate publication of terms. The Task Force recommends that a User's Group consisting of local government and software representatives be formed and meet regularly with OCS; that the Task Force meet as needed or no less than semi-annually to address broader issues. Further, to allow maturity, the Task Force considers it essential that the Data Collection system currently in place not be expanded for a minimum of three years after the initial rollout. The attached report responds to the SEC and provides the Task Force's conclusions and recommendations.

Sincerely,

A.B. Smith, Director
        Chair, CSA Data Collection Task Force

PC: SEC

September 14, 2004

At the April 28, 2004 meeting of the SEC, during the Public Comment period, concerns were raised regarding the Data Set, submissions and software. The State Executive Council asked that the CSA IT Task Force meet and discuss those concerns. An excerpt from the minutes of that meeting is attached.

The Task Force met as follows:

- June 15, 2004 – review issues and identify processes
- July 15, 2004 – Focus Group with Software Developers/Vendors
- August 26, 2004 – Review and approve a formal response to the SEC

<u>Process</u>

Actions by the Task Force during this time include:

1. **Analysis**

    As this project has been in place for almost a year and as with any significant undertaking, it is important to undertake a thoughtful review. The Task Force would take this appropriate course of action regardless of the SEC request. The Task was to determine what is working smoothly and what might need adjusting. There is no implied criticism in doing this, it is simply a good and sound business practice that can only strengthen and improve a process that represents a major investment in time and effort.

    To do this the Task Force secured input from the following sources:
    - Local Coordinators
    - OCS - Index of identified issues and actions taken in response
    - DSS Data Warehouse Errors Log

    Information was assembled and distributed to members of the Task Force.

2. **Software issues**

    Some problems/issues with specialized CSA data collection software have been identified. It is important to remember, however, that the software vendors have a fiscal relationship with each individual local jurisdiction, which must define their specific needs and address any associated costs. Since the Commonwealth does not fund the software for data collection, it would therefore be inappropriate for the Task Force or even OCS to direct a vendor to make any specific software changes that would result in billings to individual localities.

    In order to avoid inadvertently and inappropriately creating costs for localities, discussions with vendors were held collectively as a Focus Group. This meeting occurred on July 15, 2004 and in addition to the Task Force, included all identifiable vendors of CSA software. Coordinators from Richmond and Chesterfield who had expressed concerns were invited to participate as guests of the Task Force. Jane Woods, Secretary of Health and Human Resources, also attended that meeting.

OCS staff provided an overview and input was solicited from software representatives, as well as local government members, on what is working well and what they regard as needing clarification or improvement. Any information provided to vendors on expectations was heard collectively by all and any specific information gathered regarding software issues can be relayed by OCS to the localities that are the vendors' customers.

Conclusions and recommendations:

After careful review the Task Force has concluded:

♦ That systemic issues have occurred during the first year implementation of this project but that this is to be expected with this massive an undertaking.

♦ The problems have largely been related to the need for greater clarity of the data elements. OCS and DSS have responded as these needs have been identified. It is necessary to assure a common understanding of the elements – OCS, software vendors and local staff inputting data. This is accomplished by:
  • Adequate publication of terms, etc.
  • Training
  • Communication
  • Responsiveness to items as they are identified

Input from the Focus Group would indicate that this is generally happening. To further improve that, the Task Force recommends that a Users Group be formed that would include local government representatives and software vendors. An attachment to this report identifies the recommended composition and process for that group.

The mission of this Group is to focus on the day-to-day operations of the data system.

♦ That the Task Force meet semi-annually to assure continued review and assessment.

♦ That the Data Collection system currently in place not be expanded for a minimum of three years after the initial roll-out (ending 6/30/06) to allow the system to become fully operational; to identify and affect any needed corrections; and local governments as well as state agencies have the opportunity to become fully adjusted to the process and have benefit of using the data collected. Planning for future changes should correspond with the Commonwealth's Biennial Budget Cycle.

CSA Data Users Group (15 members)
9/14/04

Governmental Members:

Member	Representing	Software
1. Chuck Savage, Chair	OCS	
2. Chris Metzbower	Fairfax County	Harmony/large locality user
3. Mary Wians	Hanover County	Harmony/medium locality user
4. Debbie Harris	Roanoke County	Computer Partners
5. Mark Formella	Norfolk DSS	Alternative
6. CeCe Smith	Bedford County	Thomas Brothers
7. Debra Pierce	Goochland County	Web User
8. Lee Goldman	Arlington and Coordinators/SLAT	Softscape pending
9. Art Ritter	DSS Data Warehouse Manager	

Software vendors

Software Vendor	Representative
1. Harmony Information Systems	Sarah Garrett
2. Design.Com 3. (OCS Web system)	Pat Hutchinson
4. Thomas Brothers Corp	Keith Thomas
5. Computer Partners	Barbara Kagey
6. Softscape	Ellen Gulden

CSA
Data Collection Task Force
Beginning 2002

Membership:

Local Government Representatives

A.B. Smith – York County / Task Force Chair
Robert A. Cox, III, Charlottesville DSS Director
M. Gail Ledford, Fairfax County CSA Coordinator
Cecelia A. Smith, Bedford County CSA Coordinator
Lee Goldman, Arlington County CSA Coordinator
James C. Wallis, Pulaski County DSS Director

State Agency Representatives

Wayne M. Turnage, DMAS
Harry R. Sutton, DSS
David W. Burhop, Formerly DMHMRSAS (now DMV)
James E. Burns, VDH
Alan G. Saunders, OCS
Charles E. Savage, OCS
Harry E. Heckel, DJJ